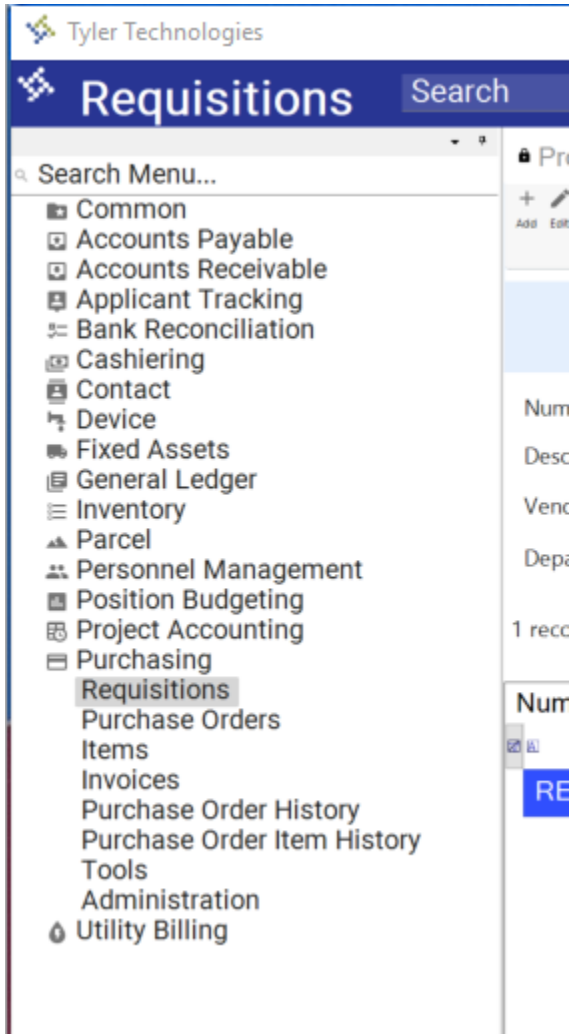


## Incode 10: Creating Purchase Order Requisition

1. Go to: Purchasing/**Requisitions**



2. Select “Add”

Tyler Technologies

# Requisitions

Search

Processing My Dashboard Requisitions X

+ Add Edit Delete Issue PO Refresh View More

Search Menu...

- Common
- Accounts Payable
- Accounts Receivable
- Applicant Tracking
- Bank Reconciliation
- Cashiering
- Contact
- Device
- Fixed Assets
- General Ledger
- Inventory
- Parcel
- Personnel Management
- Position Budgeting
- Project Accounting
- Purchasing
- Requisitions**
- Purchase Orders
- Items

Number Total A

Description Issue D

Vendor Type number or name... On Hol

Department Include

1 record f... Clear Se

Number	Description	Reque	Vendor	Vendor Name	Ve

### 3. Input General Info:

Requisition Manager: REQ00002 - Practice Req

Save and Close Save and New Delete Print Screen Help Load Template Copy From Requisition

Vendor Name: SPARTAN ENVIRONMENTAL SERVIC... PO BOX 9321 Change Business Address Amount: \$641.50  
 Vendor Number: 156676 SALEM, OR 97305  
 Vendor Set: 01 U.S.A.  
 Approval Status: Waiting for Approval

General Number REQ00002 Next Number  
 Item Entry Description Practice Req  
 Shipping En Department 1500 - Departm  
 Items Distri Issue Date 5/12/2020  
 Item Appro On Hold  
 Item Appro Requested By Sam Cord  
 Items Transf Notes  
 PO Notices Auto Approve  
 Documents Ship To  
 User Define Vendor 156676 • SPARTAN ENVIRONMEN

Detailed Description

for practice before BPG

- Enter Packet **Number**: Select “Next Number” button if new PO, otherwise enter in numbers and letters as appropriate for POCOs
  - If you are creating a POCO (Purchase Order Change Order), please use the subsequent letter beginning with an uppercase A (If your PO# is 2141501, your first POCO would be 2141501A. The following POCO would be 2141501B).
- Enter **Description** of PO: If one-time purchase order enter what purchase order is for. Example: Repair Parts. If entering an open purchase order please put FY XX-XX OPEN POCO DEPARTMENT. Example: FY 19-20 OPEN POCO WASTEWATER COLLECTION.
- Select your **Department**: You can find your department by selecting the magnifying glass icon to the right of the selection line.
- **Issue Date** will automatically display the current date, please change to the beginning of the fiscal year for purchase order to be assigned.
- **Requested By** will automatically have the requestor’s name. No action needed.
- On the **Ship To** line, always select 000-000.

- **Vendor:** Enter the vendor number or select the magnifying glass to search for a vendor. If you cannot find a vendor, please contact Gina Roden, ext. 4159, or Jennifer Reeves, ext. 4112.
- **Detailed Description:** This section is *Compulsory* and *vital* for any POs regarding government funded or large, ongoing projects. This is where to enter required information such as Bid information and authorized signers

#### 4. Input Item Entry:

Requisition Manager: REQ00002 - Practice Req

Save and Close Save and New Delete Print Screen Help Load Template Copy From Requisition

Vendor Name: SPARTAN ENVIRONMENTAL SERVIC... PO BOX 9321  
 Vendor Number: 156676 SALEM, OR 97305  
 Vendor Set: 01 U.S.A.  
 Approval Status: Waiting for Approval

Change Business Address Amount: \$641.50

General  
 Item Entry  
 Shipping En  
 Items Distri  
 Item Appro  
 Item Appro  
 Items Transf  
 Notes  
 PO Notices  
 Documents  
 User Define

Commodity: 500 practice units  
 Item Description: 500 practice units  
 Ship To: 000 - 000  
 Vendor: 156676 - SPARTAN

Units: 1.000000 Price: 500.000000 Amount: 500.00  
 Ordered: 1.000000 500.000000 500.00  
 Shipping: 99.00  
 Sales Tax: 42.50  
 Total Item: \$641.50  
 Trade Discount: \$0.00

Account: \*\*\*Multiple\*\*  
 Project Account Na...  
 Split Distribution  
 Special Instructions

Vendor Part Number  
 Need By Date

Add Delete Resequence

Seq	Comm	Item Descri	Vendor	Trans	Is Ta	Units	Price	Amo	Ship	Tax	Total	Nee	Ship	Ven	Account	Account N	Project Acc	Project Account
1	GOO	500 practi	SPARTA			1.00	500.	500.	99.0	42.5	641.		000		***Multiple		***Multiple	

\$5... \$9... \$4... \$6...

Automatically Add Rows

- Select the type **Commodity** always select N/A
- Enter **Item Description**.
- On the **Ship To** line, always select 000-000.
- The **Vendor** should be the same as the general tab.
- Enter the **Ordered Amount** this should be the total taxable amount of invoice
- Enter the **Shipping Amount**.
- Select **Sales Tax** check the box to the right of the sales tax line and manually input the total sales tax in the amount column.

- Enter GL number in the **Account** cell. You can search for an account number by selecting the magnifying glass to the right of the account cell.
- Enter a **Project Number**, if applicable. You can search for project number by selecting the magnifying glass to the right of the account cell.
- *If the PO needs to be split between multiple accounts or other non-taxed fees needed to be added, select the **Split Distribution** button (go to step 5).*
- Select **Add** on the bottom right to add other goods or services to the PO and repeat step 4 to complete these new items, if applicable.
- Select **Save and Close**.

#### 5. Input Split Distribution (If Applicable):

Requisition Item Distribution Maintenance

Close Form Print Screen Help Actions

Item: 500 practice units Distribution Type: Percent  
 Item Total: 641.50 Rounding differences, if any, will be applied to the last distribution account entered.

Account 110-0000-3125 Investigation services  
 Project Account Na...  
 Distribution Percent 50.00%  
 Distribution Amount 320.75

Add Delete

Seq	Account	Name	Project A	Project A Amou	Per	Separa	Sep. Tax Percentage
1	110-000	Investig		320.	50.	■	
2	110-000	Vacatio		320.	50.	□	
Totals:				\$641.00	100%		.00%

☒ Automatically Add Rows

- Select the **Distribution Type**: select “Percent” to allocate a percentage of the PO to an account or “Amount” to manually enter dollar amounts to different accounts.
- Select an **Account**. You can search for an account using the magnifying glass.
- Select a **Project Number**. You can search for a project number using the magnifying glass.

- Enter the **Distribution Percent** or **Distribution Amount**.
- Select **Add** and repeat step 5 for the next account you wish to be allocated.
- Continue to add or delete lines as needed until the full amount of the PO has been allocated to the desired accounts.
- Select **Close Form**.
- Confirm that step 4 is also complete, then hit **Save and Close** (Pictured in Step 4).